Initial Face-to-Face Contacts

Note: In order to create an initial face-to-face contact, an assignment to the case is not needed.

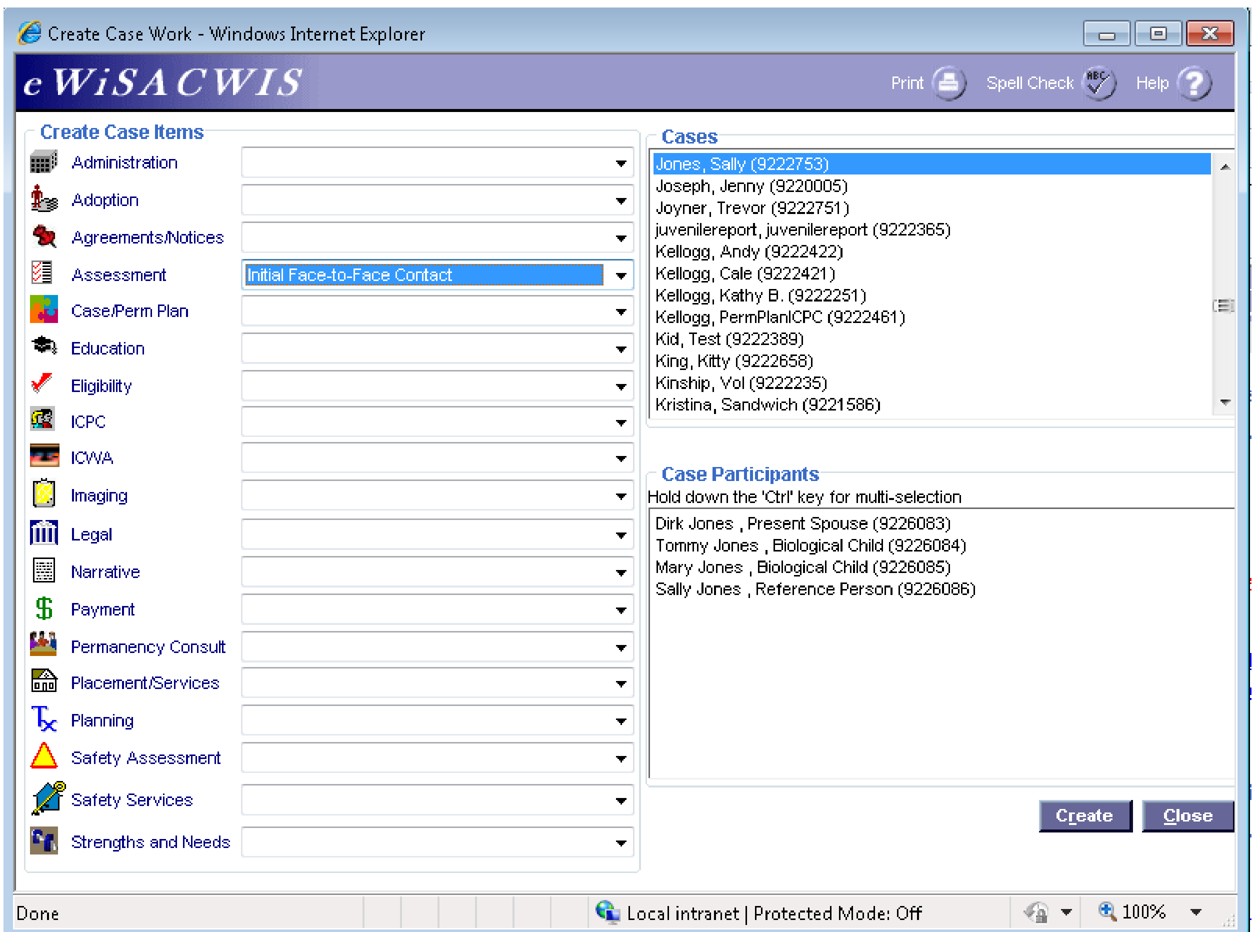
Introduction

The following guide walks through multiple ways of creating an Initial Face-to-Face Contact for Assessment, and how to create an Initial Face-to-Face Contact for Ongoing.

Assessment Face-to-Face Contacts

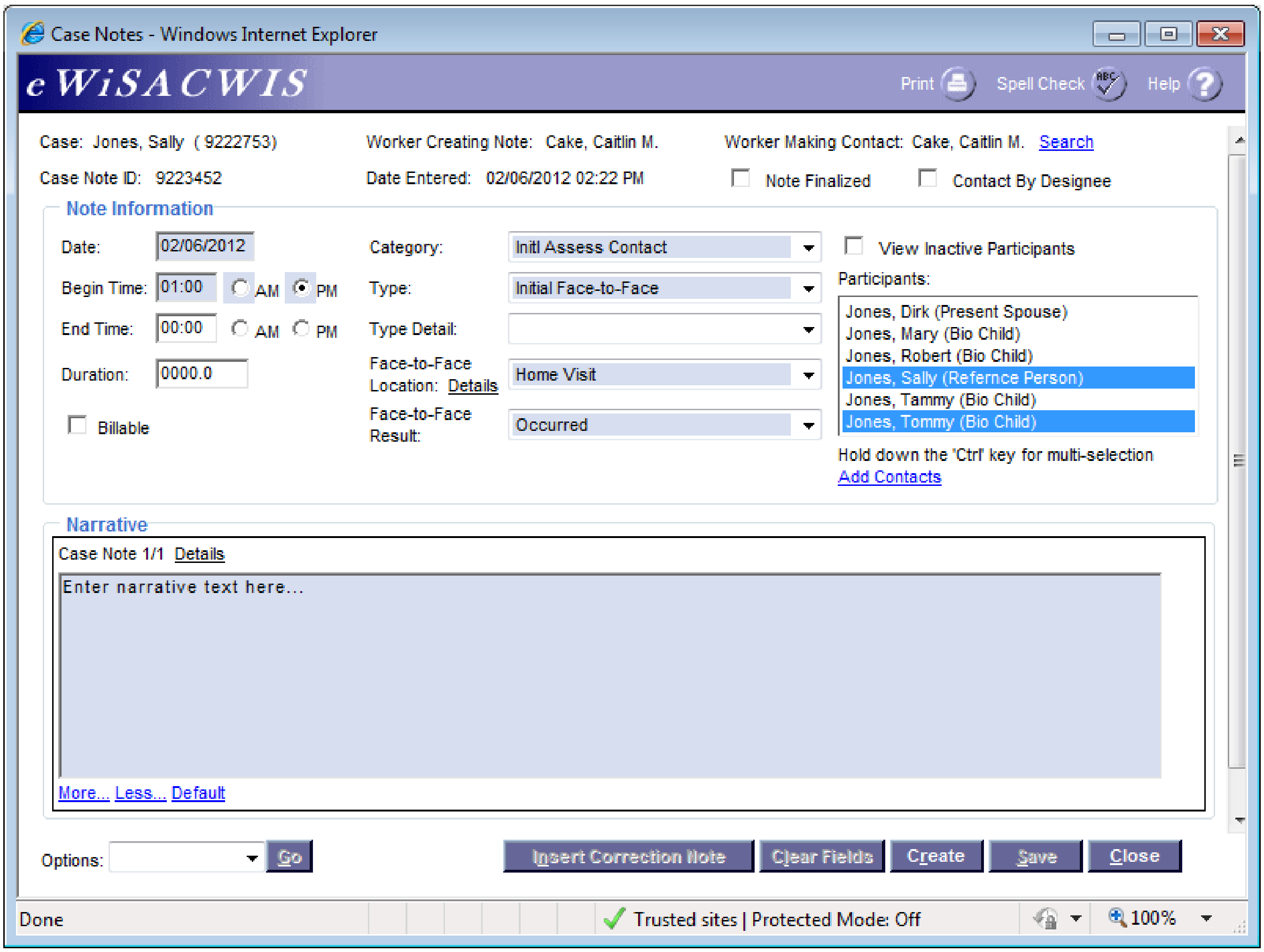
Note: In order to create an Assessment Face-to-Face Contact, there must be a pending Assessment for the case. There are three ways to create an Assessment Face-to-Face Contact: the Create Case Work page, the Actions hyperlink next to the case, and the Assessment page.

1. To create an Assessment Initial Face-to-Face Contact via the Create Case Work page, select Create > Case Work > Assessment > Initial Face-to-Face Contact. Select the case and the participant(s) and click 'Create.' This will open the Case Notes page.

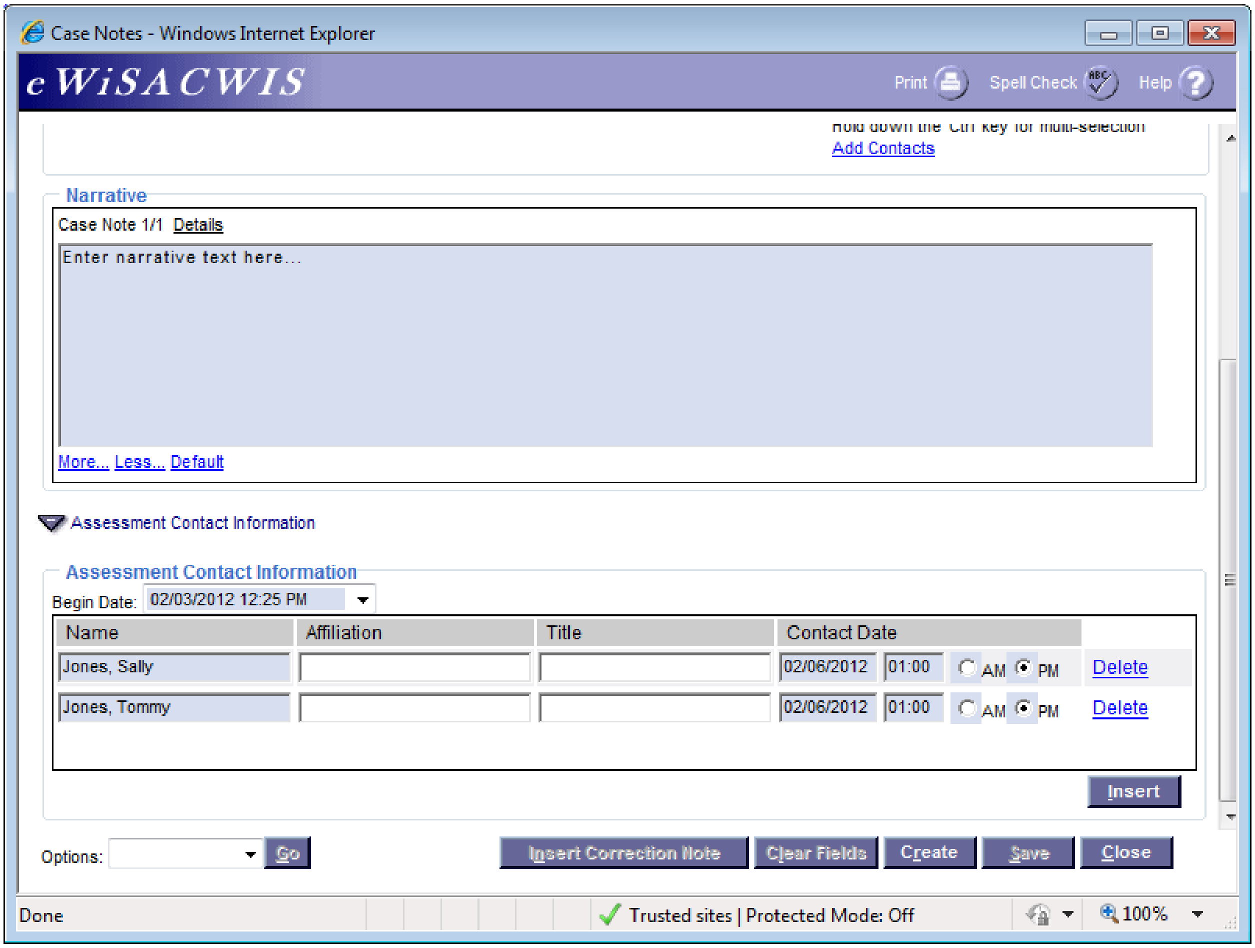


2. On the Case Notes page, enter the date the contact occurred in the Date field. The Category and Type will pre-fill. Enter the Face-to-Face Location, Face-to-Face Result, and the Narrative. Use the Search hyperlink to search out the Worker Making Contact if that is different than the Worker Creating Note. In the Participants group box, you can change the selected participants by clicking on the desired names. Use the 'Ctrl' key to select more than one participant. Click the Add Contacts hyperlink to add them to the Assessment Contact Information group box, shown on the next page.

   Note: Per policy agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.

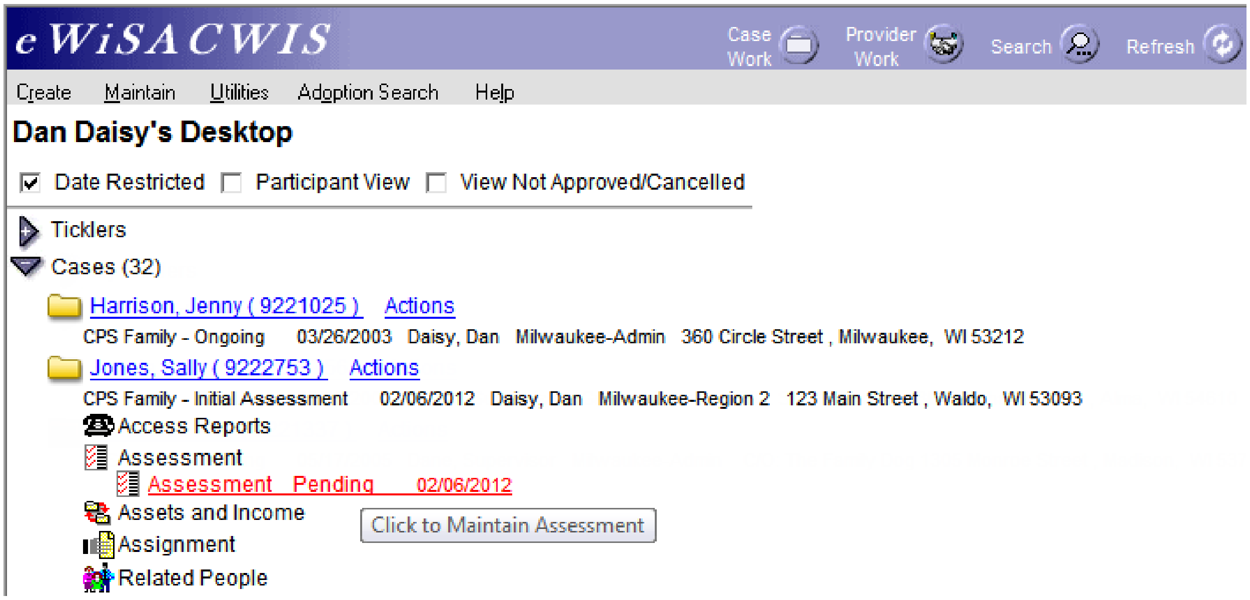


3. The participants selected in the Participants group box at the top of the page pre-fill in the Assessment Contact Information group box. To add participants not listed in the Participants box above, click the Insert button. The Begin Date is the date and time the Assessment this note is being linked to was created.

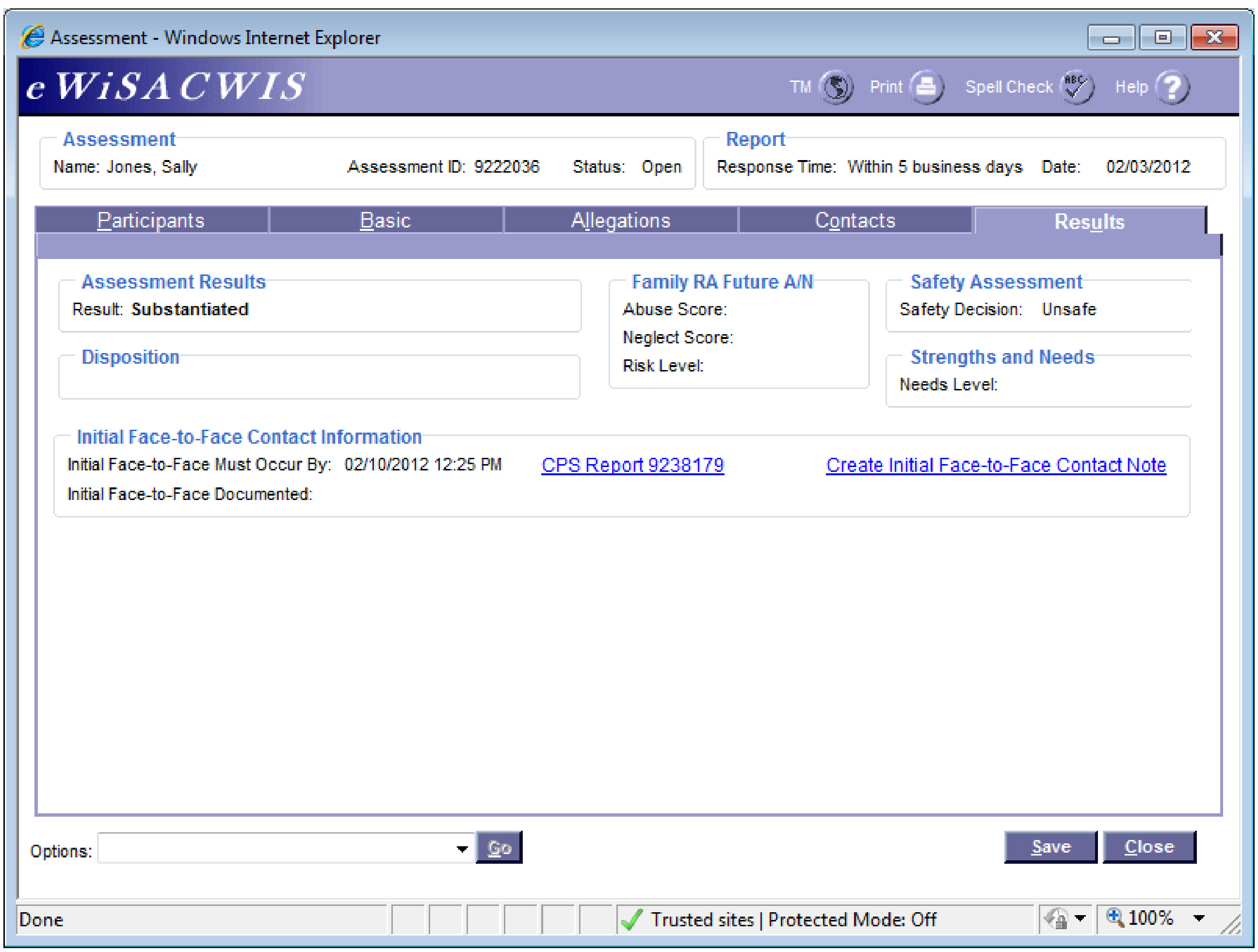


4. Click the Save button to save the page, then click the Close button.

5. To create an Assessment Initial Face-to-Face Contact via the Assessment page, access the pending Assessment from your desktop. This will open the Assessment page.

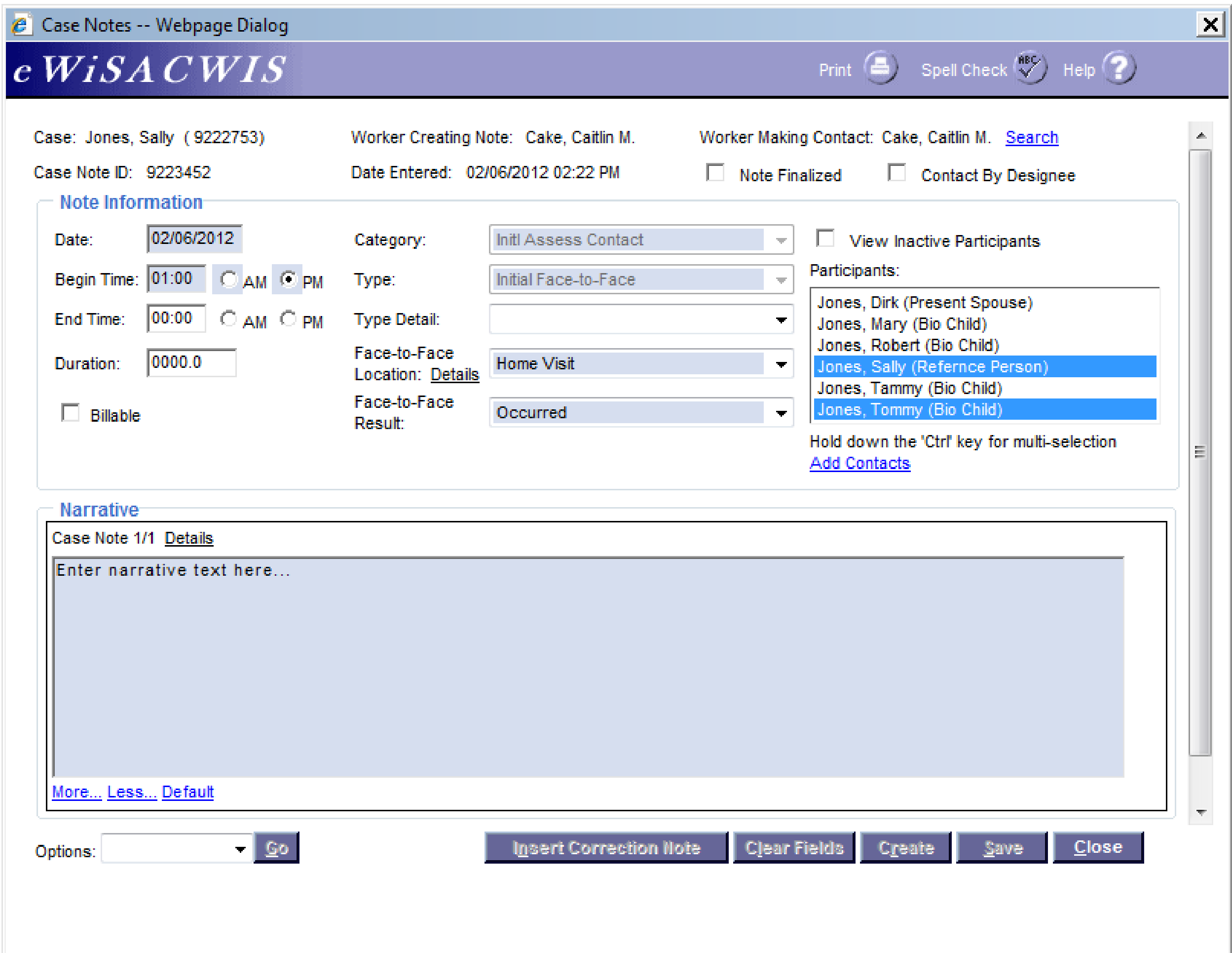


6. On the Assessment page, click on the Results tab. In the Initial Face-to-Face Contact Information group box, click on the Create Initial Face-to-Face Contact Note hyperlink. This will open the Case Note page.

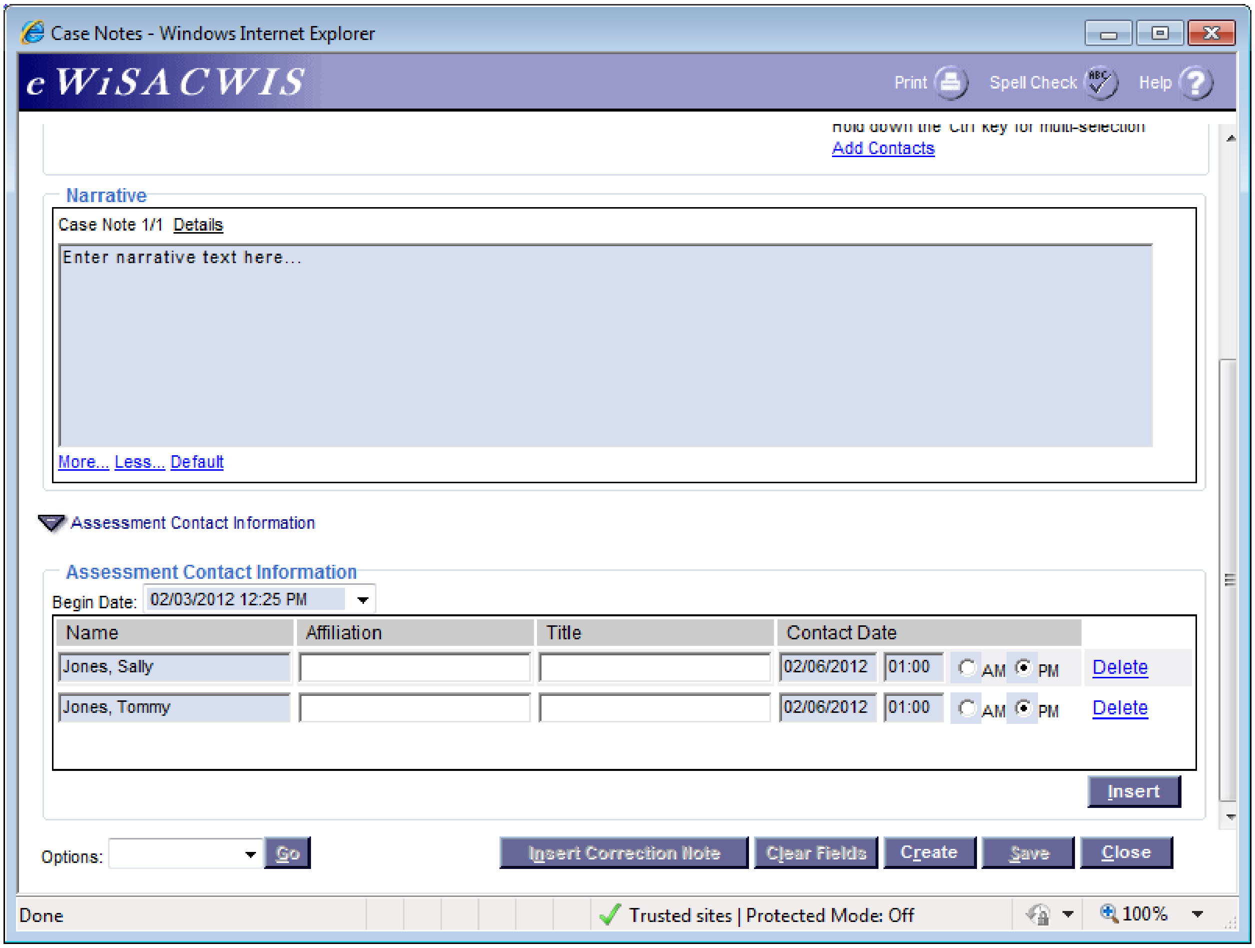


7. On the Case Notes page, enter the date the contact occurred in the Date field. The Category and Type will pre-fill. Enter the Face-to-Face Location, Face-to-Face Result, and the Narrative. Use the Search hyperlink to search out the Worker Making Contact if that is different than the Worker Creating Note. In the Participants group box, you can change the selected participants by clicking on the desired names. Use the 'Ctrl' key to select more than one participant. Click the Add Contacts hyperlink to add them to the Assessment Contact Information group box, shown on the next page.

   Note: Per policy agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.

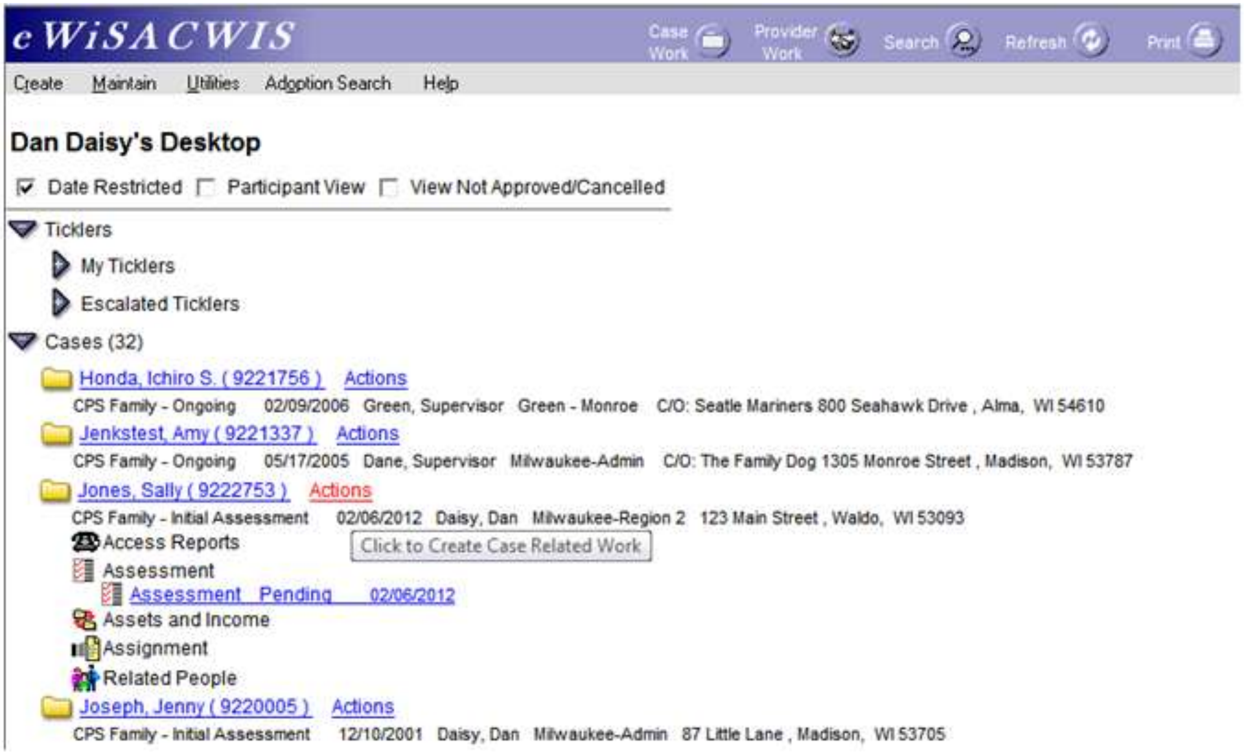


8. Click the Add Contacts hyperlink found beneath the Participants box to populate the participants selected in the Participants group box at the top of the page to the Assessment Contact Information group box. To add participants not listed in the Participants box above, click the Insert button. The Begin Date is the date and time the Assessment this note is being linked to was created.

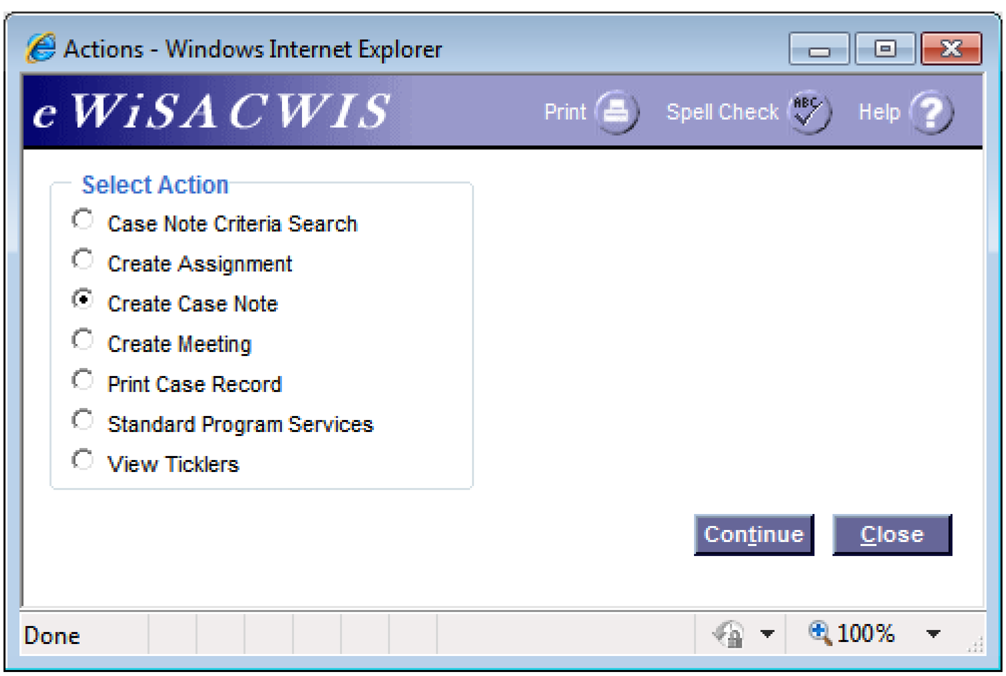


9. Click the Save button to save the page, then click the Close button.

10. To create an Assessment Initial Face-to-Face Contact via the Actions hyperlink, click on the Actions hyperlink next to the case on your desktop (or from Search, where a case assignment is not needed) which has the pending Assessment. This will open the Actions page.

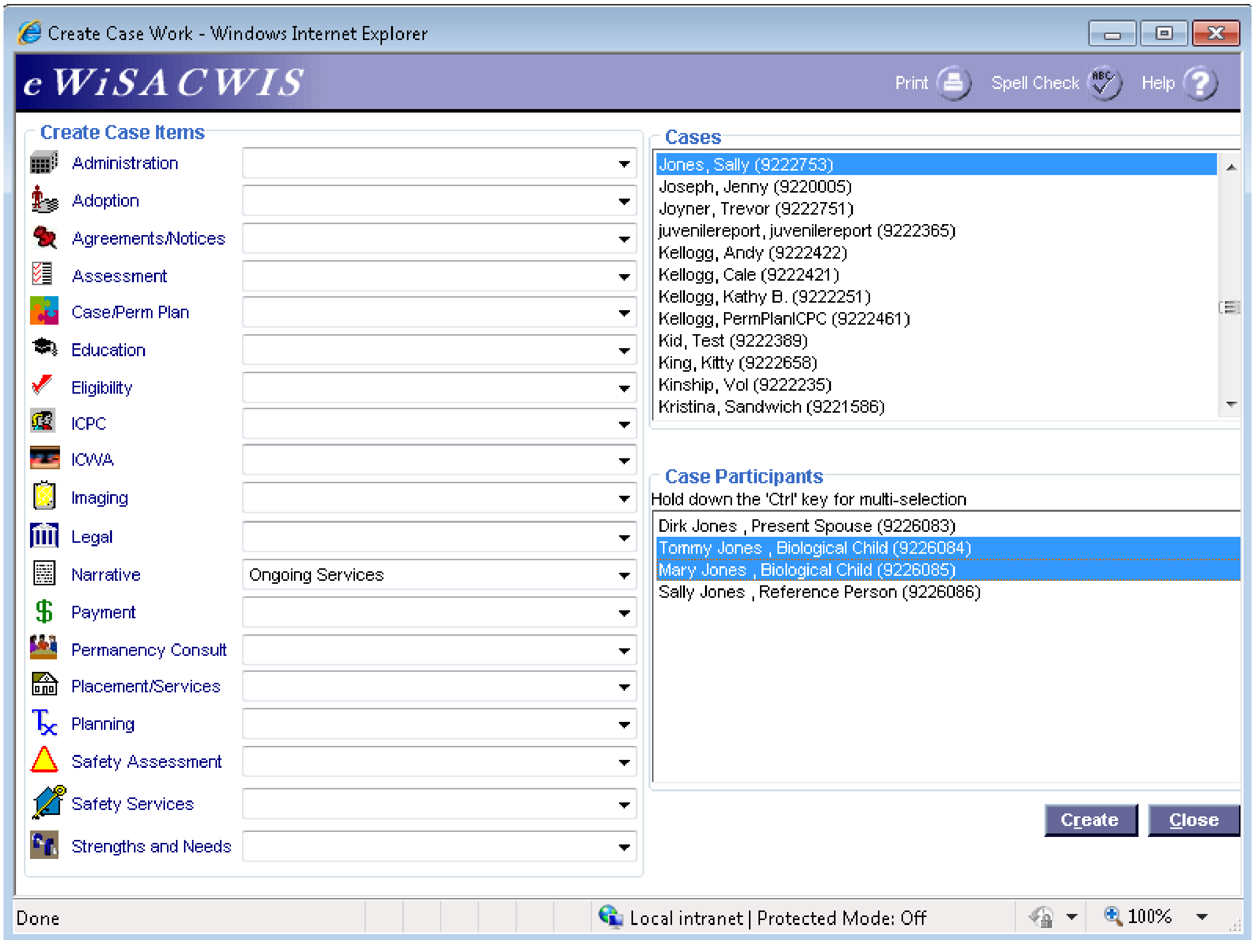


11. On the Actions page, select the Create Case Note radio button and click Continue.



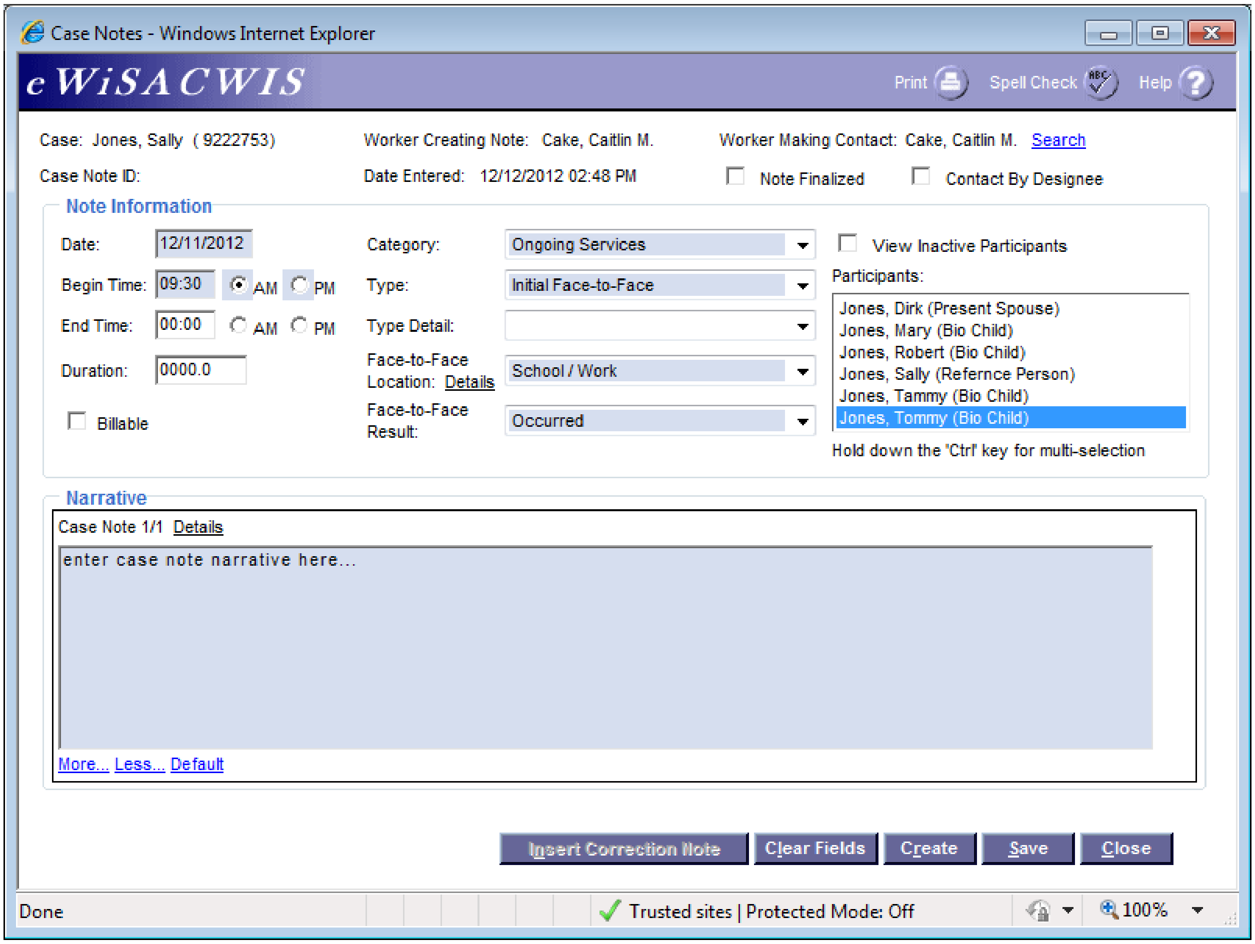
Ongoing Face-to-Face Contacts

1. To create an Ongoing Initial Face-to-Face Contact, select Create > Case Work > Narrative > Ongoing Services. Select the case and participant(s), and click Create. This will open the Case Notes page.



2. The Case Notes page opens. Enter the date the contact occurred in the Date field, select Initial Face-to-Face Contact for the Type, enter the Face-to-Face Location, and Face-to-Face Result. Finally, enter the Narrative.

Note: Per policy agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.



3. Click the Save button to save the page, then click the Close button.